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ABSTRACT

Prepared to assist the Board of Governors of the California Community Colleges in the development of its "New Basic Agenda" for 1996, this report discusses several major statewide trends with important implications for California's community colleges. Data are reviewed on population growth, labor market and technological changes requiring community colleges to provide the workforce with new skills, economic cycles, educational funding, changing family structures, immigration and multicultural issues, and public policy. Specific trends and projections presented in the report include the following: (1) by 2000, nearly one half of California's population will consist of people of color; (2) the labor force will incorporate more women, minorities, recent immigrants, and older workers; (3) technological change will place an increased emphasis on communications and information processing, services, and occupational retraining and upgrading, with most new jobs requiring some postsecondary education; (4) much of California's future economic growth will be determined by the availability of skilled labor, suggesting that community colleges will have a major responsibility for the state's future economic development; (5) community colleges will need to accommodate the changing educational needs of the increasingly diverse student population; and (6) policy changes will affect workforce preparation, funding, and functions of community colleges. Contains 31 references. (TGI)

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Trends of Importance to California Community Colleges

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Chancellor's Office
California Community Colleges

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Trends of Importance to California Community Colleges

August 1996

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Trends of Importance to California Community Colleges

Preface

This report reviews California's recent experience and possible future for a number of factors that impact how California community colleges are valued and operated. This information was prepared as background from which the Board of Governors' *New Basic Agenda: Policy Directions for Student Success* were developed. The Board adopted the *New Basic Agenda* in March 1996 and is using that document as their vision and broad direction for policymaking in the community colleges.

Trends of Importance is being issued at this time in the hope that it will be of use to community college planners as they analyze state and local trends that affect their decisionmaking. For instance, assumptions about the emerging character of California's economic recovery will have a direct influence on projections of student enrollment demand and on decisions about community college budgets, curriculum, and services.

Dramatic changes will continue in the work place and basic fabric of California society, thereby changing the skills and knowledge needed by students and the technology available to help them learn. And, while the state's economic recovery is expected to continue, demand for community college services will likely exceed the colleges' ability to meet that need because of public funding constraints.

Trends presented in this report are taken from a variety of sources and include information categories that comprise the typical "environmental scan" used in strategic planning: demography, technology, economy, society, and public policy.

The research and assessment of trends and their implications for this report were conducted by staff of the Chancellor's Office Research and Analysis Unit, in the Policy Analysis and Development Division. If you have comments or questions about this information, direct them to us by phone at (916) 327-5887, FAX at (916) 327-5889, or by E-Mail at cmcintyr@cc1.cccco.edu.

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August 1996

Summary

Demography

While California's population increase slowed during the recent recession, growth continues, and the numbers of 18- to 24-year olds, after declining for nearly a decade, will start to increase rapidly, beginning 1997 and continuing through 2005. The number of high school graduates already has begun to increase. And, the state's population is becoming much more multicultural. By 2000, nearly one-half of California's population will be people of color—thirty percent will be Hispanic—and most of the new residents will be either Asian or Hispanic.

The state's labor force is changing dramatically. Currently, six of every ten California workers are women or minorities. By contrast, the state's labor force will change such that during the next ten years fourteen of every fifteen workers making up that change will be minority or female. Over one-half of the new workers will be women and many will be recent immigrants who have entered the state during this decade. There will be a substantial increase in older workers as well. Many of the new workers will come from population groups that, in the past, have been underrepresented in education. The challenge of improving their access to education is especially significant for the community colleges since most of these individuals begin their postsecondary education at a community college.

Technology

Technological change demands increasingly higher skills from the labor force. Like other states, California's economy is shifting from an industry to a knowledge basis in which emphasis will be put on communications and information processing technologies; more on services and less on manufacturing. Most of the new jobs created during the next decade will require some postsecondary education. And, community colleges train for virtually all of the largest growing job categories in California. Moreover, technological change also means more job and career changes by workers and an increased need for occupational retraining and upgrading—functions also performed by community colleges.

Economy

Community colleges are affected by economic cycles. Downturns, for instance, produce declines in real income per capita and accompanying increases in unemployment—both of which, in turn, simultaneously result in greater demand for, but less funding for, community colleges. The recent recession was no exception to this situation. A relatively modest recovery is underway, but despite this, more Californians will be unemployed and in need of training in the future than at virtually any time in the past.

Long-term prospects for the California economy are uncertain, but forecasts show future growth rates in total personal income that are somewhat below the eight percent annual average rate the state has

recorded over the past thirty years. Much of California's future economic growth will be determined by the availability of skilled labor. The emerging characteristics of new jobs and new workers suggest that community colleges will have a major responsibility for the state's future economic development.

Society

Technological change also is producing profound, but ambiguous changes in society. Like most other states, California is undergoing rapid social change, but, in addition, it also is shifting to a multicultural society. And, a so-called "network" society is beginning to emerge, where more skilled workers are becoming independent contractors, rather than "traditional employees," and where more and smaller firms use temporary joint ventures like partnerships and alliances to accomplish their work. At the same time, corporate acquisitions and mergers are increasing in frequency. From this changing environment emerge potential students whose learning styles and needs are quite different than those of students in earlier generations. Their flexibility and rapid response should enable community colleges to accommodate these changing educational needs.

Public Policy

Voter initiatives continue to constrain the authority and revenue-raising capability of California public policy bodies, particularly at the local level. While the state is a leader in research and development, it lags in its public investment in infrastructure and education. Federal efforts at deregulation, decentralization and less proscriptive policies will continue to put more responsibility on state and local authorities. This will particularly impact workforce preparation where California Community Colleges are active partners in efforts to coordinate the state's existing programs and to make them more responsive to structural changes in the work place and more accessible to all those who need the training.

The state's *Constitution* provides K-12 and community colleges with abundant funding in good economic times, but not in bad economic times; i.e., the recent recession. With the expected economic recovery, improved funding, and moderate student fee increases, community college enrollment could increase from 1.4 million to 1.8 million—400,000 more students—over the next decade. But, while community college operating budgets will increase in the near term, needed maintenance and expansion of college physical plants have problematic sources of financial support in the long-term.

Adding to the uncertainty faced by community colleges are the possible future consequences of public policy actions about the legality of immigrant services in Proposition 187 (1994), CSU plans for elimination of remedial instruction, a proposed constitutional revision removing community colleges from Proposition 98 (1988) funding, and revisions to affirmative action at UC.

Demography

Following decades of rapid growth, the California's population increase has slowed somewhat as a result of the recent recession. However, growth continues and, after nearly a decade of decline, the number of 18-24 year-olds, will increase rapidly beginning 1997—the number of high school graduates has already started to increase—and continue through 2005 (Figure 1). Known as the "baby-boom echo," this group comprises nearly one-half of the population base from which community colleges draw their enrollments. The state's elderly population also will be increasing rapidly. Overall, California is expected to grow at twice the rate of the rest of the nation between now and 2005.

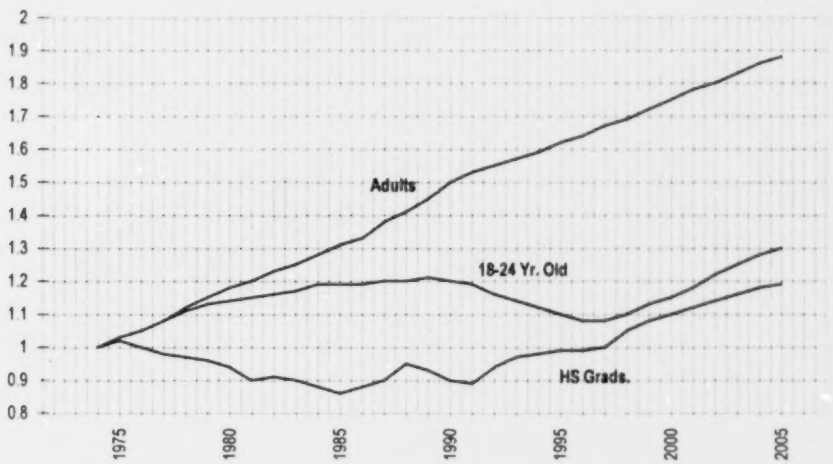


Figure 1

California Demographic Trends

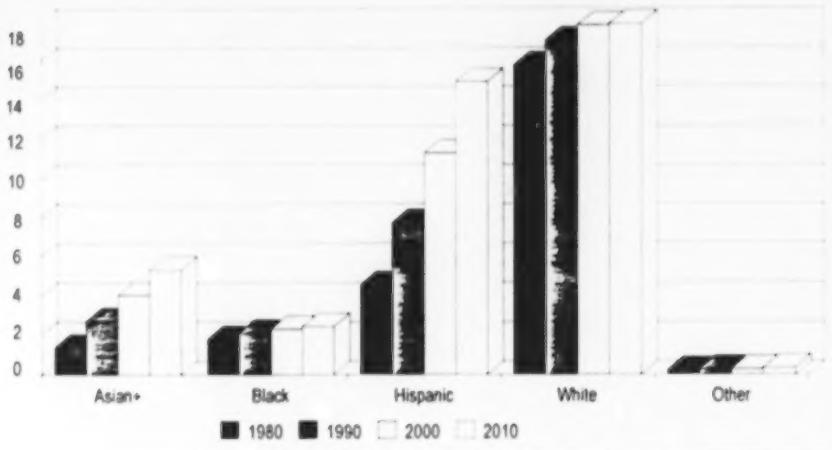
Actual 1974-1994; Forecast 1995-2005

Sources: Derived from Department of Finance, 1995; California Postsecondary Education Commission, 1995.

The multicultural character of California is changing in much the same way as Hawaii's has already. In 1990, two of every five Californians were Hispanic, Asian or Black (compared to one in every five throughout the rest of the United States). By 2000, nearly one-half of California's population will be from a minority background—thirty percent will be Hispanic—and most of the new residents will be either Hispanic or Asian (Figure 2). Currently, a language other than English is spoken in half of the households in Los Angeles County. More than one hundred different languages are spoken across the state. Nearly one-half of the added population between now and 2005 throughout California will be foreign immigrants. And, by 2010, people of color will comprise 55 percent of the state's population.

Figure 2

California Racial and Ethnic Groups
Actual 1980, 1990; Forecast 2000, 2010



Note: Asian+ includes Asian and Pacific Islanders.

Source: Derived from Center for the Continuing Study of the California Economy, California Population Characteristics, 1992.

The state's labor force is changing dramatically. At present, six of every ten California workers are women or minorities. By contrast, fourteen of every fifteen workers in the state's changing work force during the next ten years will be women or minorities. There will be substantial increases in the number of older workers. Many new workers will be recent immigrants who have entered the state during this decade and have limited English-speaking skills and may not be highly trained for jobs. An additional indeterminate number of new Californians will be undocumented immigrants, whose ultimate status will be determined largely by federal policy and by state judicial rulings about voter initiatives.

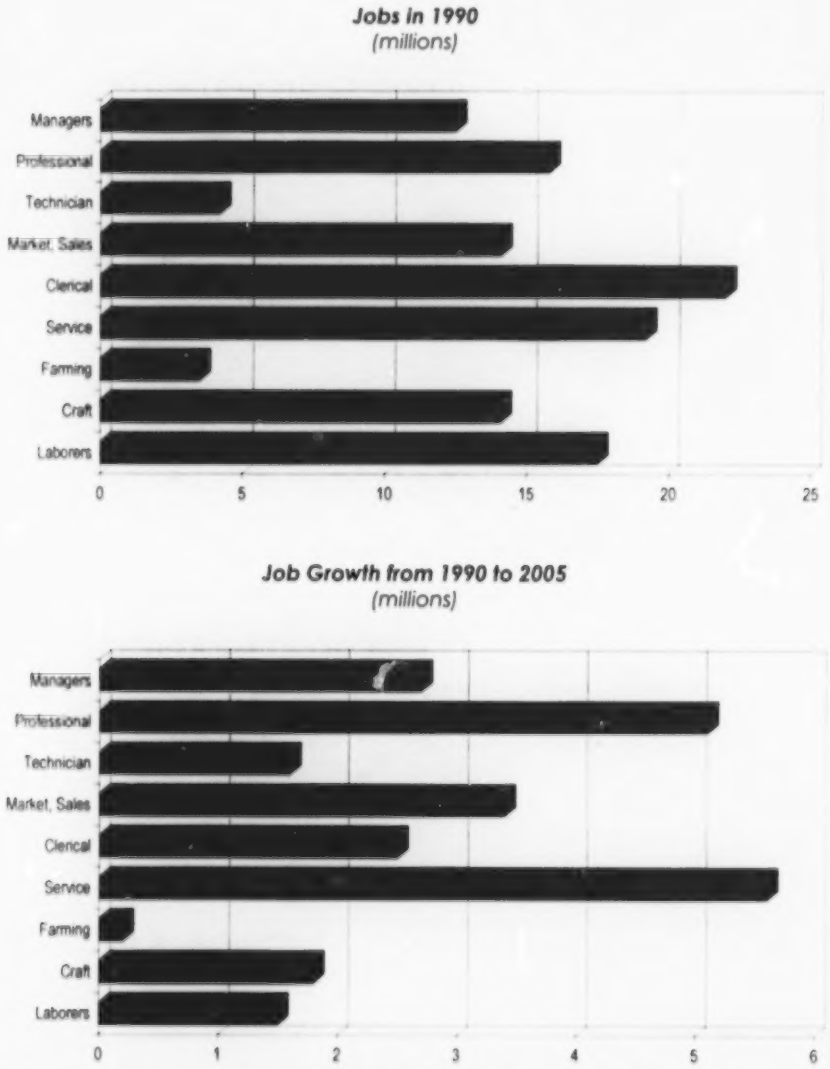
Many of California's new workers will come from population groups that, in the past, have been underrepresented in postsecondary education. The challenge of improving their access to education is especially significant for community colleges, because most of these individuals begin their postsecondary education in a community college.

Technology

Technological change demands increasingly higher overall skills from the labor force. However, it isn't clear just what kinds of new technologies—and what kinds of new skills—will be relevant to the future economy of California. Like other states, California's economy is shifting from manufacturing to services, from an industry-based economy to a knowledge-based economy (Figure 3). In the recent recession (like earlier recessions), construction, real estate and finance were hard hit, but are expected

Figure 3

U.S. Jobs and Job Growth
1990 to 2005



Source: Derived from Center for the Continuing Study of the California Economy, California Population Characteristics, 1992.

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to rebound during economic recovery. But, unlike earlier recessions, aerospace and defense-related industries lost many middle and upper-level positions, few of which are expected to return. And, it isn't clear to what degree and in which areas durable manufacturing will return. Clearly, increased emphasis will be put on communications and information processing technologies; more on services, less on manufacturing.

Nationally, it is expected that jobs requiring some postsecondary education—executive, managerial, professional, technical, and marketing and sales—will increase more than average, while jobs requiring little or no postsecondary education—clerical, farm labor, crafts, operators, and general laborers—will grow at less-than-average rates (see Figure 3). California's pattern of job growth will be similar to that of the nation as a whole.

Community colleges educate and train for virtually all of the largest growing job categories in California; including retail salespeople, managers, food preparation and service workers, clerks, cashiers, nurses, accountants and auditors, secretaries, engineers, and receptionists. As the California economy grows and undergoes the transition from manufacturing to services, several sectors can be identified to be of major importance and suggest specific ways in which the job market will change. Foreign trade (particularly with Pacific Rim countries), high technology manufacturing, professional services, and tourism and entertainment will push the state's growth. The number of jobs in computer services, pharmaceuticals, publishing, and motion pictures will continue to increase, while jobs in metal products, aerospace, aircraft, and defense will continue to decrease.

Rapid technological change means that, among other things, individuals will change careers or at least need to substantially change their job skills as many as a half-dozen times or more during their lifetime. Consequently, the retraining needs of Californians will continue to increase in the future. The community college role in retraining is substantial. Historically, of the more than half a million California community college students enrolled for job training at any given time, about one-third have been retraining for a different skill or career. Prior to 1993, for instance, two of every three community college students who already had baccalaureate degrees were enrolled to learn job skills.

Changes in information technology also enable a variety of other agents to offer training in many of the same skills and knowledges as do the community colleges. Thus, there will be more competitors in the postsecondary education marketplace, and their objectives will be to take classes to students in their homes or work place, or at other convenient sites. Motorola, Mind-Expansion, and Phoenix Universities, and public television are already well into this market.

As California moves from an industrial—to a knowledge—or information-based economy, firms are becoming more productive, largely in response to international competition and technological change. They are "downsizing;" out-sourcing (contracting for services, rather than using their "own" employees); entering into often-temporary partnerships, alliances, and collaborations; shifting to horizontal (team-based), rather than vertical, organization; and emphasizing customer needs. These developments are important for the education and training of students by community colleges, but they also may suggest ways to help restructure the colleges themselves.

Community colleges are significantly affected by the state's economic cycles. For example, economic downturns produce declines in real income per capita and accompanying increases in unemployment—both of which, in turn, simultaneously result in greater demand for, but less funding for, community colleges (Figure 4). The recent recession was no exception in that regard. And, while this recession was much more severe than the prior three recessions, it appears that recovery, though modest, began at nearly the same pace as it did after the prior three recessions. However, there will continue to be more unemployed Californians than at virtually any time in the past; and, it appears that a growing proportion of the population may be unemployed in the future.

Current economic indicators are mixed and opinion varies about the state's future economic growth. Despite the recent slowing of national and global economic recoveries, some experts see California's near-term recovery continuing and becoming more robust. Others see a more mod-

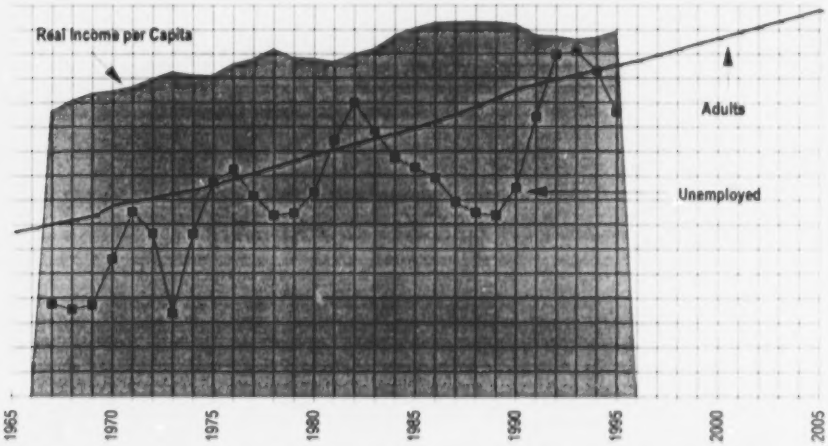


Figure 4

California Economic Trends
Actual 1965-1994;
Estimated 1995-2005

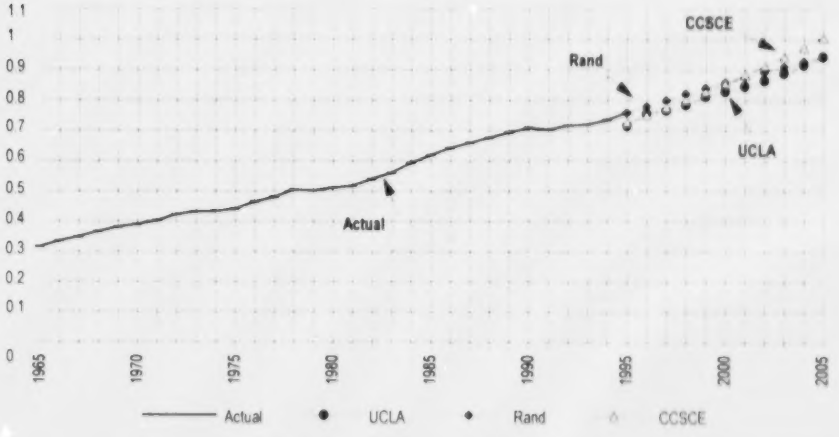
Sources: Employment Development Department, April 1995; Department of Finance, 1994; California Governor's Budget Summary, 1995-96.

est recovery. Similar arguments revolve around the long term scenario. Three forecasts for the next decade—by the Rand Corporation, the UCLA Business Forecast, and the Center for the Continuing Study of the California Economy (CCSCE)—project annual growth rates in nominal personal income: 5.8%, 6.4%, and 6.8%, respectively, that are somewhat below the state's 8.7% annual average growth rate for the past 30 years (Figure 5).

The state's future economic growth will be determined by the quality of its lifestyle and physical infrastructure; competitiveness of its tax and regulatory structure; and availability of skilled labor. However, much of the growth in new jobs will take place in occupations that have not, in the past, typically employed those individuals who will comprise the bulk of the new work force. Moreover, most of that job growth will take place in occupations with skills and knowledge that demand some postsecondary education and which, therefore, are typically taught by community colleges. And, it is the community colleges, of the state's various postsecondary institutions, that have most often enrolled those individuals who will comprise the bulk of the new work force. The inevitable conclusion to this scenario is that California community colleges have an enormous future responsibility for the training of California's labor force. The more successful community colleges and other institutions are in training the state's future labor force, the more robust will be California's future economic growth. Robust economic growth also would ease the need for public investment in welfare, unemployment, and criminal justice, and, presumably, free more funding for postsecondary education.

Figure 5

California Personal Income
Actual 1965-1994;
Estimated 1995-2005



Source: Chancellor's Office, California Community Colleges, 1995, derived from: California Governor's Budget Summary, 1995-96; UCLA Business Forecast, December 1994. Rand Corporation, *The California Master Plan Revisited. DRAFT*, January 1995. Center for the Continuing Study of the California Economy (CCSCE), California Economic Growth, 1994.

Society

Among the most significant societal changes are those taking place in the structure of the family. Currently, one of every five female adolescents in the United States bears a child before age 20, the highest rate among Western nations. Half of these mothers are unmarried. Divorce rates continue to rise. One-fourth of all children are born into poverty, and one-fourth of all children live in single-parent families. And, all these proportions continue to increase, as does the number of children with substandard or no care ("latchkey" children), although estimates are not precise.

One-fourth of the population lives alone. And, there is a general shift to individual- or home-centeredness, and away from community-centeredness—a kind of increasing isolation referred to as "cocooning." These trends will be driven by the population's aging, concern for security, and new technologies which make it possible to shop, bank, be entertained, and conduct one's business at home.

Societal changes due to technological change are profound, but somewhat ambiguous. Some observers suggest that the current generation of children will be the first with a greater acquaintance with machines than with animals. While the implications of this are not clear, students will enter college more conversant with information technologies than ever before.

In another development, a so-called "network" society is beginning to emerge in California as elsewhere, where more highly skilled workers, particularly those trained in postsecondary education, are becoming independent contractors (not traditional "employees"), and where more and smaller firms use temporary joint ventures like partnerships to accomplish their work. These trends will change the way individuals view job security and job loyalty, and the way in which individuals present or "sell" themselves, and, therefore, the kind of education they seek.

Finally, the debate increases over immigration, diversity, and affirmative action. Apart from the possible conclusions to some of these discussions, California, like most other states, is undergoing very rapid social change. And the state's shift to a multi-cultural society, already underway, will accelerate.

From this rapidly-changing environment emerges a potential community college student whose learning needs are quite different than those of students in earlier generations. Of all postsecondary institutions, the community colleges are in the best position to serve these new students who not only are seeking skills and knowledge, but also are trying to

identify career and life directions, and many doing so while working and supporting families and quite uncertain about their future.

The community colleges are flexible, and respond rapidly to the changing needs of individuals in their community and region. The community college also is a kind of "one-stop" educational institution where customers with a wide variety of skills, ranging from secondary to collegiate-level, may undertake a wide variety of objectives, ranging from precollegiate to advanced collegiate degree-oriented work. At these colleges, students also may clarify life and career goals and begin work—and often complete that work—toward those goals.

Public Policy

California voter initiatives, beginning with Proposition 13 (1978) have constrained the revenue-raising capability of the state's public tax structure and severely limited the authority of most of its public bodies, particularly at the local level. And while California is among the nation's (and the world's) leaders in spending for research and development, the state lags with respect to its public investment in infrastructure and education, and in its private investment in plant and equipment. For the past two decades, California has ranked last among all states in the growth of its public capital stock. The state's public capital stock declined by over 1% per year between 1975 and 1988. Voters generally continue to oppose local public funding and a number of California counties face difficulty in obtaining financing as a result.

At the federal level, judicial opinions are shifting from support of programs for those who have been considered disadvantaged to less proscriptive policies. Efforts to deregulate and "privatize" governmental functions, that began in the 1980s are expected to continue and expand. And, efforts to decentralize authority from the federal to state level will impact community colleges. For example, proposed block grants to the states, replacing current programmatic grants, for vocational education will change the state and local management of California Community Colleges in a substantial way.

A number of business groups have expressed concern about, and offered public policy solutions for, California's declining infrastructure, restrictive regulatory structure, and quality of life. Another key element in the state's economic development, work force preparation, is and will be a focus of public attention. Currently, 14 different state entities—one of which is the community colleges—serve 7.9 million people with work force preparation training and services. The State Job Training Coordinating Council is attempting to coordinate these programs and to ensure that initiatives like the School-to-Career program and the One-Stop Career Center system are developed within a common policy framework. Besides integrating these various programs for greater managerial efficiency, it is essential that the programs be responsive to the structural changes that are occurring in the work place, and be accessible to those who need training. Community colleges are an active partner in this work.

Public policies for health, welfare and criminal justice may cause these functions, together with elementary and secondary education, to increase substantially their future commitments of general state tax funding, leaving relatively less for postsecondary education. The potential costs of these

functions recently led the Rand Corporation to conclude that it may not be possible to fund the objectives of the *California Master Plan for Higher Education* by the end of this decade. While more rapid economic growth (than predicted by Rand), and/or changes in policies could produce other results, the long-term prospects for funding of California postsecondary education are, at best, problematic.

California community colleges are funded under Proposition 98 (1988) which guarantees elementary and secondary schools (K-12) and community colleges a share of the state's General Fund. In good economic times, this is an abundant guarantee, based as it is on growth of Californians' personal income per capita and K-12 enrollments. In bad economic times, the formula is adjusted downward to reflect the slowing in General Fund tax collections. Since 1990, increases in K-12 funding have resulted in the community colleges' share of Proposition 98 falling from 11 percent to nine percent (a loss of over $300 million for the colleges).

Funding for community college operations in the near future looks more promising than it has been in the recent past—though it is by no means certain. As noted above, most forecasters show annual growth rates in California's personal income that are near or over 6 percent during the next decade. In this environment, community college funding will increase and, like earlier periods of rebuilding, colleges will add back classes and services cut since 1990. Growing budgets together with increasing staff retirements should enable community colleges to restructure their curricula and services in ways that reflect the rapidly changing culture, economy, and demography of California.

Assuming that the state's economic recovery continues to the turn of the century, then slows, community college enrollments could increase from 1.4 million to 1.8 million—an increase of 400,000 students over the next decade (Figure 6). As depicted in Figure 6, this forecast assumes that: (a) community college budgets increase—in real (price-adjusted) terms—through 2000, then their rate of increase slows; (b) the $50 baccalaureate fee sunsets permanently in 1996; and, (c) other student fees and costs increase with the cost-of-living; i.e., are stable in real terms.

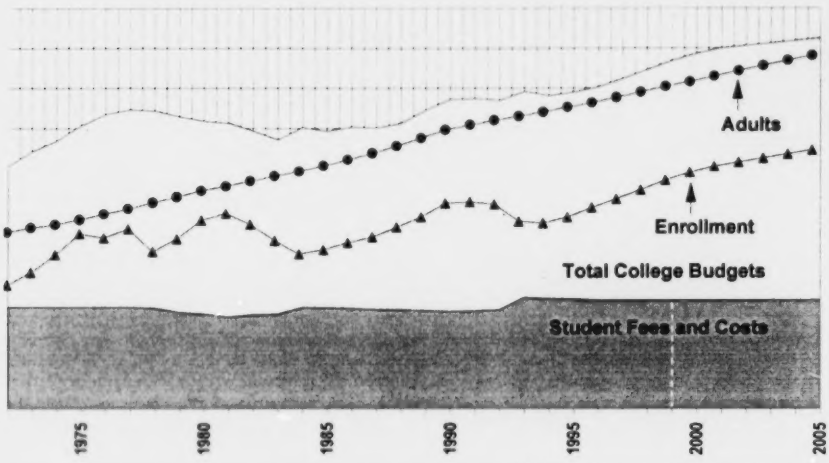


Figure 6

Community College Trends
Actual 1965-1994;
Estimated 1995-2005

Note: Student Costs include annual real (price-adjusted) student expenditures per FTES for fees, books and supplies, transportation, and child care. Total College Budgets are total annual real current expense of education. Enrollment: Total community college Fall headcount enrollment. Adults: California population 18 years of age and over. (Arithmetic adjustments are made to bring trends to similar scale.)

Source: Chancellor's Office, California Community Colleges, 1995.

Even under this relatively optimistic scenario, the colleges' accessibility (measured by: enrollment divided by adult population) still does not quite return to its 1990 level and is much below levels recorded in the late 1970s. A weaker recovery or an earlier and/or more pronounced economic downturn could change this scenario substantially.

The future balance of community college enrollments among programs is uncertain because demand will continue to be high across the entire college curriculum. Demography and public policy will continue the demand for transfer and ESL education, economic and social conditions the demand for vocational retraining, and social conditions and public policy the demand for precollegiate basic skills.

While there is reason for optimism about near-term college operating budgets, funding for needed maintenance and expansion of community college physical plants over the next decade appears far more problematic. Even with improved utilization of physical plant capacity and productivity increases, estimates place community college capital outlay needs at over $250 million per year for the next decade. The need for periodic bond proposals—in the face of the state's large and increasing debt—leave the community college capital program with uncertain funding. And, it isn't yet clear how the use of instructional technology may alleviate the future need for facilities.

Adding further uncertainty to the community colleges' future are a number of significant policy actions currently underway: (1) planning by CSU to eliminate remedial instruction; (2) revisions to student affirmative action at UC; (3) a proposed constitutional revision that, among other things, may remove community colleges from Proposition 98 (1988) funding and establish mechanisms for raising local funds; (4) legal challenges to Proposition 187 (1994), a measure that would deny education and services to illegal immigrants; and (5) an initiatve that would limit the use of affirmative action in California public employment and contracting.

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